Level of Effort Instructions

This template should be initiated during the Concept Phase of project to capture the concept level of effort estimates

Sequence of Activity

- Initiate the Common Variables page.

- Enter the current labor rates (Note: if Labor Rates are unknown, contact Manager). Utilize (X1 - X5) for additional rates. Those rates will be reflected through the rest of the document. If additional rows are needed, contact the PMO.

Concept Level Estimates

- Initiate the Concept Estimate - Option A page.

- Begin in the Concept Estimate Option A worksheet and enter a brief description of the option in cell 5B; include text that illustrates how this approach is different from the other approaches.

- Enter all of the impacted Application ID(s) and Application Name(s) that are known. Note: If Application IDs are not available enter only the Application names.

- Initiate the Concept Estimate - Option B page.

- If a second option exists, enter a brief description of the option; include text that illustrates how this approach is different from the other approaches.

- Enter all of the impacted Application ID(s) and Application Name(s) that are known.

- Initiate the Concept Estimate - Option C page.

- If a third option exists, enter a brief description of the option; include text that illustrates how this approach is different from the other approaches.

- Enter all of the impacted Application ID(s) and Application Name(s) that are known.

- Distribute spreadsheet to all of the impacted application estimate providers.

- Send spreadsheet to the impacted application estimate providers via email; Include instructions and deadline in the communication.

- Gather application estimates from the impacted application estimate providers.

- Gather concept level estimates for all of the impacted applications for each approach.

- Update the concept level estimates for each application for each approach.

- Update the concept level estimates for each application for each approach using the information provided by the impacted application estimate providers.

- Initiate the Estimate Summary page.

- Once the approved option has been selected during the Concept Phase of a project, select that option from the "Approved Approach" dropdown. The figures and description will be pulled from the appropriate "Concept Estimate" detail page.

Commitment Level Estimates

- Initiate the Commitment Level Estimate page.

- The approved option will be pulled from the "Estimate Summary" page.

- Enter all of the impacted Application ID(s) and Application Name(s).

- Distribute spreadsheet to all of the impacted application estimate providers.

- Send spreadsheet to the impacted application estimate providers; include instructions and deadline in the communication.

- Gather application estimates from the impacted application estimate providers.

- Gather commitment level estimates for all of the impacted applications.

- Update the commitment level estimates for each application.

- Update the commitment level estimates for each application using the information provided by the impacted application estimate providers. The "Estimate Summary" page will automatically update with this information.

Change Request Estimates

- Initiate a Change Request estimate page.

- For each change request, initiate a new "Change Request" detail page. Enter the number of the change request in the "Change Request" field, the change request number in this spreadsheet should match the number of the related change request in Clarity. The title of the worksheet tab should be updated to match the change request number. Document whether the change request is at the concept level or commitment level by selecting that option from the "Estimate Level" dropdown. Enter a description of the change request. If a new change request tab is needed, right-click on the last change request tab and select the "Move or Copy" option. Click on the "Create a copy" check-box and insert the copied worksheet at the end of the workbook.

- Enter all of the impacted Application ID(s) and Application Name(s).

- Distribute spreadsheet to all of the impacted application estimate providers.

- Send spreadsheet to the impacted application estimate providers; include instructions and deadline in the communication.

- Gather application estimates from the impacted application estimate providers.

- Gather change request estimates for all of the impacted applications.

- Update the change request estimates for each application.

- Update the change request estimates for each application using the information provided by the impacted application estimate providers.

- Update the Estimate Summary page.

- Add the estimate summary information to the appropriate "CR(s)" column based on the "Estimate Level" selected for the change request. As new change requests are created, the estimate summary information for these change requests should be added to the existing values on this page.

Administrative Information

Revision	Author	Date	Sections Affected	Change Summary
1.0		1/2/2009		

Current Version	1.0

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Master Document Chapter Number	3
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